

B-7

DIRECTIONS FOR COMPLETING FORM 45, FITNESS REPORT

GENERAL

1. POLICY

It is Organization policy to inform employees of the effectiveness of their work performance. Organization policy also requires that supervisors record at least once each year their opinions and evaluations of the work performance of employees under their jurisdiction. Evaluations will also be made whenever it is necessary or desirable to provide Organization management with information which may be pertinent to future personnel actions affecting these individuals. Regulation [REDACTED] outlines policies concerning the requirements for submitting initial, annual, reassignment and special reports, showing the report to the employee and appeals procedure. The Fitness Report, Form 45, is used to record evaluations. However, an evaluation in memorandum form may be substituted for Form 45 for employees in Grades GS-14 and above.

2. SUBMISSION

The Fitness Report will be submitted in triplicate to the Head of the Career Service concerned. The Head of the Career Service will retain one copy and will forward the original and other copy to the Office of Personnel.

3. INITIAL REPORT

A Fitness Report will be prepared for each employee as of nine months after his entrance on duty with the Organization. An initial report need not be made when a Fitness Report has already been made for some other purpose within 90 days prior to the due date of the initial report. The initial report is of particular importance in providing a record of the supervisor's evaluation of the employee before the employee has completed his twelve-month trial period. An initial report may be deferred for a period not to exceed 30 days beyond the due date to provide the supervisor with additional time to evaluate an employee who has been under his jurisdiction for less than 90 days.

4. ANNUAL REPORT

A Fitness Report will be prepared annually for each employee, except when a Fitness Report has been made for some other purpose within 90 days prior to the due date of the annual report. An annual report may be deferred until the employee has been under the jurisdiction of the supervisor for 90 days.

SCHEDULE FOR SUBMISSION OF ANNUAL REPORTS

<u>GRADES</u>	<u>FOR PERIOD ENDING</u>	<u>DUE IN OFFICE OF PERSONNEL</u>	
		<u>FROM HEADQUARTERS</u>	<u>FROM FIELD</u>
GS-1 through GS-5	31 March	30 April	31 May
GS-6 through GS-8	30 June	31 July	31 August
GS-9 through GS-11	30 September	31 October	30 November
GS-12 and GS-13	31 December	31 January	28 February
GS-14 and above	31 March	30 April	31 May

5. REASSIGNMENT REPORT

A Fitness Report will be prepared whenever both the Immediate Supervisor of the employee and the Reviewing Official are changed by the reassignment of the employee. For the purpose of fitness reporting "Immediate Supervisor"

refers to the official who prepares and signs the Fitness Report of the employee concerned. When the supervisor is reassigned and has numerous reassignment reports to prepare he need complete only SECTION B of the Fitness Report.

DRAFT

SECTION A - GENERAL

The items of this section should be completed by the appropriate administrative or personnel officer. Special instructions for completing or omitting items of this part of the report should be carefully observed on Field Transmittal - Fitness Report Form 45a.

SECTION B - EVALUATION OF PERFORMANCE OF SPECIFIC DUTIES AND OF OVERALL PERFORMANCE

Rating Scale

The rating scale as set forth in this section in Form 45, Fitness Report, is to be used to reflect evaluation of Specific Duties and of Overall Performance. In making your selection of the adjective evaluation for Section B and in completion of the narrative in Section C the following factors should be considered as appropriate:

Productivity	Mobility
Decisiveness	Records Discipline
Cooperativeness	Versatility
Initiative	Cost Consciousness
Resourcefulness	Security Consciousness
Supervisory Effectiveness	
Ability to Think Clearly	
Acceptance of Responsibility	
Effectiveness of Written Expression	
Effectiveness of Oral Expression	

Rating of Performance of Specific Duties

In this section the supervisor will list in order of importance the most significant duties the employee has performed during the rating period. Each duty shall be described in sufficient detail to provide information which may be useful later in considering individuals for other assignments. Your evaluation should be recorded by entering the appropriate letter in the box provided for your evaluation of each duty.

Rating of Overall Performance in Current Position

In making this rating the supervisor should take into account the employee's conduct on the job as well as his performance on all specific duties. Each supervisor will weigh these factors in his own mind so as to arrive at a rating which will reflect an employee's overall value on the job.

SECTION C - NARRATIVE DESCRIPTION OF MANNER OF JOB PERFORMANCE

In this section the supervisor describes the employee's demonstrated abilities or deficiencies in the performance of his present job. This may include

comments regarding a specific duty by direct reference to that duty. Any relatively high or low ratings in Section B should be explained or amplified by supporting statements. In addition, the supervisor may comment here on any extenuating circumstances which affects the productivity and effectiveness of the employee. Comment should be made on the relative performance of the person being rated with other people known to the rater doing comparable work. In commenting on the performance of managerial or supervisory responsibilities, abilities and skills in such as the following should be considered:

Delegation of responsibility
Establishment and maintenance of clear lines of authority
Use of personnel, space, equipment, funds, etc.
Formulation and coordination of programs
Developing teamwork

SECTION D - CERTIFICATION AND COMMENTS

The person being rated may attach to his fitness report a memorandum concerning any part of the report. The memorandum will be attached to the original for inclusion in the Official Personnel Folder.

Reviewing officials are responsible for assuring that all reports made by rating officials under their jurisdiction are consistent and reflect uniform standards of reporting. Through counseling and supervision of rating officials, the reviewing officials can play a major role in improving the operation of the Fitness Report program.

In addition, reviewing officials should as a matter of practice submit a brief narrative evaluation of the performance and potential of the individual being rated, noting the degree to which he is personally familiar with the individual and his work. Even though the reviewing official may not be able to evaluate the individual from first-hand experience with him, it is likely that the reviewing official may be able to contribute useful information concerning future utilization or training of the individual based on the review of his record of performance and assignments.

Some disagreement between the supervisor and the reviewing official when preparing evaluations is not unusual. In a situation where there are significant discrepancies between the evaluation of the supervisor and the reviewing official, the Director of Personnel will discuss the report with the Head of the Employee's Career Service to determine whether corrective action is appropriate.

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TAB C

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This Notice Expires 1 March 1963

PERSONNEL

HN
1 March 1962

REVISED FITNESS REPORTING PROGRAM

1. This Notice establishes a revised Fitness Report, Form 45. The changes have resulted from an extensive study of Agency-wide experience with the previous form. While no basic policy changes are instituted various changes have been made in the format and instructions in order to bring about greater uniformity in rating standards.

2. The principal changes in the revised form and instructions are as follows:

A. IDENTIFYING INFORMATION

Provision has been made to reflect current personnel categories (Career, Career Conditional, Reserve, Temporary, etc.)

B. RATING STANDARDS

A five point adjectival scale, which is defined on the form, has been provided for the rating of specific duties and overall performance. It is believed that clear and precisely defined rating standards will result in more uniform interpretation and application by supervisors throughout the Agency.

C. DESCRIPTION OF THE EMPLOYEE

The rating of personal characteristics on the basis of a five degree scale in the previous fitness report form has been discontinued. The revised instructions call for the consideration of personal characteristics in making evaluations of the performance of specific duties and of overall performance; the new instructions also call for comment on important personal characteristics in the Narrative Description of Job Performance.

D. NARRATIVE DESCRIPTION OF JOB PERFORMANCE

The instructions have been modified and amplified to set forth the scope and nature of narrative description desired. Supervisors are urged to include information in their narrative description on; personal characteristics, qualifications, training, development and future assignments. Relatively high or low ratings on the performance of specific duties or on overall performance should be explained in this section. Comment should also be made here on the relative performance of the person being rated with other people known to the rater doing similar work.

E. CERTIFICATION AND COMMENTS

Revisions have been effected in the fitness report form and the instructions have been amplified in an effort to have reviewing officials play a greater role in the evaluation of personnel.

HN

PERSONNEL
1 March 1962

The responsibility of reviewing officials for the maintenance of consistent and uniform standards of reporting within their jurisdiction has been emphasized and, in addition, they have been encouraged to provide a brief narrative evaluation covering performance, potential and utilization of the person being rated in the additional space provided in the report.

A significant addition to the form is an item in which the individual states whether he has appended a comment. This will call the attention of using officials to such comments.

3. The revised Fitness Report, Form 45, Directions for Completing Form 45, Fitness Report and Field Transmittal Form 45 A, are to be used effective _____.

FOR THE DIRECTOR OF CENTRAL INTELLIGENCE:

L. K. WHITE
Deputy Director
(Support)

DISTRIBUTION: ALL EMPLOYEES